

**DUTY STATEMENT**

GS 907T (REV. 03/03)

**SHADED AREA FOR HUMAN RESOURCES ONLY**

**INSTRUCTIONS:** Refer to the Essential Functions Duty Statement Preparation and Construction Manual for Instructions

RPA-

**11481 - OBAS**

EFFECTIVE DATE:

1. <b>DGS OFFICE OR CLIENT AGENCY</b> Office of Business and Acquisition Services		POSITION NUMBER (Agency - Unit - Class - Serial)	
2. <b>UNIT NAME AND CITY LOCATED</b> Business Services Section/West Sacramento		3. <b>CLASS TITLE</b> Associate Governmental Program Analyst	
4. <b>WORKING HOURS/SCHEDULE TO BE WORKED</b> 8:00a.m. to 5:00p.m.		5. <b>SPECIFIC LOCATION ASSIGNED TO</b> 707 3 <sup>rd</sup> Street, 2 <sup>nd</sup> Floor	
6. <b>PROPOSED INCUMBENT</b> (If known)		7. <b>CURRENT POSITION NUMBER</b> (Agency - Unit - Class - Serial) 306-030-5393-925	
<p>YOU ARE A VALUED MEMBER OF THE DEPARTMENT'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO ENABLE THE DEPARTMENT TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.</p>			
<p>8. <b>BRIEFLY (1 - 3 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</b>  <b>Under the direction of the Staff Services Manager I, the incumbent serves as the FI\$Cal coordinator and the FI\$Cal subject matter expert while acting as liaison between OBAS and FI\$Cal.</b></p>			
9. Percentage of time performing duties	10. Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>		
	<p>The Department of General Services (DGS) Core Values and Employee Expectations are key to the success of the Department's Mission. That mission is to "Deliver results by providing timely, cost-effective services and products that support our customers." DGS employees are to adhere to the Core Values and Employee Expectations, and to perform their duties in a way that exhibits and promotes those values and expectations.</p> <p><b>This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete a Form 700 within 30 days of appointment. Failure to comply with the Conflict of Interest Code requirements may void the appointment.</b></p> <p>To ensure the proper policies and procedures are being followed, the following work will be performed in accordance with the guidelines of the Department of General Services (DGS), Administration Division (AD), Office of Business and Acquisition Services' (OBAS) utilizing Strategic Plans, DGS and OBAS Policy Manuals and Memorandums, Executive Orders, FI\$Cal policies and procedures, Purchasing Authority Manual (PAM), State Contract Manual (SCM Volumes 1, 2 and 3), Management Memos, Administrative Orders, published directives within the Government Code (GC), Department of Finance (DOF) Budget Letters, California Department of Human Resources (CalHR), State Controllers' Office (SCO), Public Contract Code (PCC), California Code of Regulations (CCR), State Administrative Manual (SAM), Civil Code (CC), Military and Veterans Code, Labor Code (LC) and office procedures using Microsoft Applications.</p>		
11. <b>SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE</b>			
SUPERVISOR'S NAME (Print)		SUPERVISOR'S SIGNATURE	
		DATE	
12. <b>EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT</b>			
<p>The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise to balance the workload.</p>			
EMPLOYEE'S NAME (Print)		EMPLOYEE'S SIGNATURE	
		DATE	

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	<p><b>ESSENTIAL FUNCTIONS</b></p> <p>The incumbent functions independently and in a team environment. The incumbent adheres to DGS' Core Values and is accountable for promoting customer satisfaction and providing quality service. The incumbent must gain knowledge on the purchasing and contracting modules within FI\$Cal. This requires an understanding of various roles, acquisition types, requisition submission, solicitation events, P-Card transaction entry and reconciliation, reportable data tracking, and integration with Accounts Payable.</p> <p>25% In order to work collaboratively and carry out the duties to ensure the successful implementation of FI\$Cal, the incumbent will:</p> <ul style="list-style-type: none"> <li>Analyze the FI\$Cal processes to gain knowledge in order to provide accurate information to the end users and be able to solve complex issues</li> <li>Identify and articulate risks and issues depending on the situation once identified</li> <li>Collaboratively work with FI\$Cal and OBAS on issues to develop functional solutions that are best for OBAS analysts</li> <li>Function as the OBAS FI\$Cal subject matter expert in planning, organizing, writing, and implementing clear, concise, timely, targeted, effective and relevant information to assist OBAS analysts in their day to day procurement in FI\$Cal</li> <li>Implement an effective communications program within OBAS by ensuring all OBAS analysts are informed on updates and changes within FI\$Cal</li> <li>Create and implement standardized processes (by writing policies and procedures) to ensure all OBAS analysts are using the same FI\$Cal methodology</li> <li>Improve access and transparency of FI\$Cal by providing weekly reports on contract information</li> <li>Provide updates to OBAS chief and management team on all FI\$Cal issues</li> <li>Act as liaison between FI\$Cal and OBAS management</li> </ul> <p>20% In order to support the FI\$Cal implementation and continuous organization of the acquisitions, the incumbent will:</p> <ul style="list-style-type: none"> <li>Develop, design and implement process and procedures to help OBAS establish a structure, enabling the business to participate in and manage the transition from their current operational state to the future state of FI\$Cal</li> <li>Create, design and maintain FI\$Cal database and electronic documents that will provide the ability to electronically receive and submit documents between agencies and other DGS offices</li> <li>Track purchase volumes and costs by vendor and commodity code or service code to increase strategic sourcing opportunities and capture total state spending data to make more effective procurement choices</li> <li>Update (by keying in critical vendor information and DGS contract information) the central source for financial management data to reduce the time and expense of vendors, departments, and agencies collecting, maintaining, and reconciling redundant data</li> </ul>

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	<p><b>ESSENTIAL FUNCTIONS, continued</b></p> <p>15% In order to support change management and documents essential to the change management efforts, the incumbent will:</p> <ul style="list-style-type: none"> <li>• Perform complex analytical staff work in the areas of FI\$Cal integration by identifying areas in need of improvement and providing resolutions</li> <li>• Work independently to create work plans (flow charts, instructions for use) for the OBAS analysts to assist in their ability to work within the FI\$Cal system</li> <li>• Formulate, conduct, and analyze surveys for OBAS and review survey data to formulate reports, summaries, data findings to ensure FI\$Cal is functional and efficient, then make recommendations for any problem areas</li> <li>• Implement corrective actions as appropriate to enable OBAS to function efficiently in FI\$Cal</li> <li>• Review OBAS FI\$Cal policies, procedures and other documentation for quality assurance and provide an overview to OBAS management</li> </ul> <p>15% In order to evaluate the effectiveness of the communication efforts, the incumbent will measure and monitor communication. The incumbent will:</p> <ul style="list-style-type: none"> <li>• Gather, monitor and analyze acquisition analysts feedback on FI\$Cal to determine communication effectiveness and provide recommendations for improvement</li> <li>• Research, develop and recommend emerging communication methods from FI\$Cal to OBAS management and staff, to better achieve communication objectives and goals</li> </ul> <p>10% In order to facilitate appropriate FI\$Cal communication to OBAS the incumbent will:</p> <ul style="list-style-type: none"> <li>• Independently coordinate and facilitate all FI\$Cal project communications, including verbal, written, web-based media to effectively disseminate information about the FI\$Cal</li> <li>• Monitor communications (e-mails, documents, databases) for quality, consistency and adherence to the FI\$Cal plan</li> <li>• Analyze communication needs and formulate material including presentations and develop appropriate messaging and communications for all phases of FI\$Cal</li> </ul> <p>10% In order to support and advance OBAS readiness, the incumbent will:</p> <ul style="list-style-type: none"> <li>• Establish and maintain positive and effective working relationships with FI\$Cal as well as OBAS team members to promote collaboration and support FI\$Cal activities</li> <li>• Independently assist OBAS in identifying and monitoring preparedness for FI\$Cal and communication efforts to successfully deploy the FI\$Cal system</li> </ul>

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5%	<p><b>ESSENTIAL FUNCTIONS, continued</b></p> <p><b>MARGINAL FUNCTIONS</b></p> <ul style="list-style-type: none"> <li>• Represent OBAS at FI\$Cal forums</li> <li>• Perform other duties as required to ensure a successful implementation of the FI\$Cal Project</li> <li>• Act as back up to FI\$Cal trainers as needed</li> </ul> <p><b>KNOWLEDGE AND ABILITIES</b></p> <p>Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership.</p> <p>Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees.</p> <p><b>DESIRABLE QUALIFICATIONS</b></p> <ul style="list-style-type: none"> <li>• Exercise a high degree of diplomacy, tact, professionalism, initiative and independence</li> <li>• Establish and maintain cooperative and positive work relationships</li> <li>• Excellent attendance and punctuality</li> <li>• A demonstrated interest in assuming increasing responsibility</li> <li>• Mature judgment, loyalty, and discretion</li> <li>• Demonstrated knowledge of or ability to learn FI\$Cal, Purchasing, PAL, and Microsoft applications</li> <li>• Organization skills, set priorities, and work independently with minimum of supervision</li> <li>• Experience in analyzing and interpreting laws, rules, and regulations</li> </ul> <p><b>INTERPERSONAL SKILLS</b></p> <ul style="list-style-type: none"> <li>• Communicate in a clear and concise manner</li> <li>• Communicate confidently and courteously with staff and management, including individuals of various levels in the private sector and state government</li> <li>• Demonstrated quality customer service</li> <li>• Ability to work in a team environment with the ability to lead the team toward completing of a task</li> <li>• Receive and follow written and verbal direction from supervisors/lead person</li> </ul>

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	<p><b>ADDITIONAL QUALIFICATIONS</b></p> <ul style="list-style-type: none"><li>• Knowledge of purchasing rules and regulations</li><li>• Knowledge of the state CAL-Card program</li></ul> <p><b>WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES</b></p> <ul style="list-style-type: none"><li>• Appropriate attire for a professional office environment</li><li>• Multi-task, meet deadlines, and adjust to changing priorities</li><li>• Work under pressure and meet tight deadlines</li><li>• Daily use of the personal computer and related software applications at a workstation</li><li>• Daily use of office machinery (fax, copier, etc.)</li><li>• Work overtime as needed</li></ul>

